

**THE ADMINISTRATIVE RESOURCE CENTER
BUREAU OF THE PUBLIC DEBT - TRAVEL SERVICES BRANCH**

RELOCATION / TRANSFER QUESTIONNAIRE

Authorization Number: _____

The information requested below is needed to develop an estimate of the cost of your transfer, as provided for in 5.U.S.C. 5721, et seq, and the Federal Travel Regulations. A travel authorization will be prepared by the Relocation Specialist based on these responses. The Relocation Specialist will provide you with an estimate of allowable reimbursements, and any additional information required to facilitate your relocation.

We realize that you will not be able to furnish exact information for every item at this time, but provide your best estimates for each item that will be involved in your transfer. Please notify us immediately if significant changes develop which may affect costs such as dates of travel, shipment of household goods, number of dependents or real estate transaction costs.

Please send your completed form to: Travel Service Branch, Bureau of the Public Debt, Attn: Relocation Section, Parkersburg, WV 26106-1328. To expedite preparation of the Authorization, please fax the completed form to: Travel Services Branch at FAX: (304) 480-8480.

1. Employee Name: _____ SSN #: _____
Work Phone: () _____ FAX #: () _____
Reporting Date: _____
Office transferring to: _____

Retirement Plan : _____

Civil Service Retirement System (CSRS): _____
Civil Service Retirement System (CSRS) Offset: _____
Federal Employees Retirement System (FERS): _____
Other: _____

Employee Pay Grade and Full Annual Salary at time of Relocation: _____
(This is required to ensure appropriate Federal taxes are calculated correctly)

2. Official station from which transfer will be made:

(City) (County) (State)

3. **Dependents Relocating (Spouse & Immediate family under age 21):**

<u>Name</u>	<u>Relationship</u>	<u>Date of Birth of Children</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

For relocating dependents over the age of 21, please state reason for dependency (Ex. Parents):

<u>Name</u>	<u>Reason for Dependency</u>
_____	_____
_____	_____
_____	_____
_____	_____

4. **TRAVEL TO NEW OFFICIAL STATION:**

(Every effort should be made for the employee and immediate family to accomplish travel at the same time.)

a. Will you, and members of your immediate family travel together? _____

Give your anticipated departure date _____, arrival date _____ and mode of travel:

_____ Privately-owned automobile (POV)

_____ Common carrier: Air _____ Train _____ Bus _____

b. If your family will be traveling separately, give anticipated departure date _____, arrival date _____ and mode of travel:

_____ Privately-owned automobile (POV)

_____ Common carrier: Air _____ Train _____ Bus _____

Please state reason why it is necessary for your family to travel separately:

c. If driving, what is your estimated mileage (one way) : _____

5. **TEMPORARY QUARTERS: (ACTUAL EXPENSE METHOD)**

Temporary Quarters actual expense is NTE 60 days unless authorized. Temporary Quarters may be utilized at the old or new duty station. The first 30 days is based on the standard CONUS per diem rate of \$60 for lodging and \$31 for meals per day for the employee. The Spouse and children 12 years of age and older are allowed 75% of the employee rate. Children under 12 years of age receive 50% of the employee rate. Subsequent 30 day claims are reduced for the employee to 75% of the CONUS per diem rate, Spouse and children 12 years of age and older to 50% of the CONUS per diem rate, and children under 12 years of age to 40% of the CONUS per diem rate.

(Itemized receipts are required. Refer to the Relocation Guide)

<u>Name</u>	<u>Location</u>	<u>Estimated # of days</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

TEMPORARY QUARTERS: (FIXED EXPENSE METHOD)

Temporary Quarters fixed expense is a one time NTE 30 days entitlement. This entitlement is based on the per diem rate (same as the TDY rate) of the location you are being relocated to. The employee will receive 75% of the locality rate, the spouse and children (regardless of age) will receive 25% of the locality rate. This is calculated by taking the entitlement for one day times the percentage each eligible individual is allowed, times the number of days needed for temporary quarters, not to exceed the 30 days allowable.

(Itemized receipts are NOT required. Refer to the Relocation Guide)

Please select the method of Temporary Quarters Allowance you wish to receive:

Temporary Quarters Actual Expense: _____

Temporary Quarters Fixed Expense: _____

If you have any further questions about which option to select, please contact the Relocation Coordinator before you make your choice. He/She will provide the calculations to help you choose your option.

6. **TRANSPORTATION AND TEMPORARY STORAGE OF HOUSEHOLD GOODS:**

(Temporary Storage NTE 90 days unless authorized)

- a. Number of bedrooms in current home: _____
- b. Anticipated date of shipment: _____
- c. Will you require temporary storage at the old official station? _____ Approx. # of days: _____
Will you require temporary storage at the new official station? _____ Approx. # of days: _____
- d. Mobile home:
 - 1) Do you desire to move a mobile home which you own and will occupy as a residence? _____
 - 2) If so, where is it presently located? _____
 - 3) Date it will be moved? _____

7. **UNEXPIRED LEASE: * (See Below)**

- a. Are permanent residence quarters currently being leased at old official station? _____
- b. Will there be any penalties or expense incurred in connection with settlement of an unexpired lease? _____
If yes, give estimated amount _____, and explain below why the expense cannot be avoided:

8. **SALE OF RESIDENCE AT OLD OFFICIAL STATION: * (See Below)**

- a. Do you plan to sell your residence at your old official station? _____
- b. Type of residence: _____
- c. Is the title in your name or in the name of one or more members of your immediate family? _____
- d. Did you acquire the residence prior to the time you were informed of your transfer? _____
- e. Do you anticipate completion of the sale within two years after the date of reporting to your new official station? _____
- f. Estimated sale price of the residence: _____

9. **PURCHASE OF RESIDENCE AT NEW OFFICIAL STATION: * (See Below)**

- a. Do you plan to purchase a residence at your new official station within two years after the date you report for duty? _____
- b. Estimated purchase price: _____

* (You must complete sale, purchase and lease termination within two years after you report for duty at your new station unless an extension of time has been authorized. You may be granted an extension of two additional years, however, it is the RELOCATEE'S responsibility to request an extension BEFORE the two years has expired.)

The above responses are accurate and complete to the best of my knowledge at this time. Any significant changes will be brought to the attention of the Relocation Coordinator.

(Signature of Employee)

(Date)

Upon completion of this questionnaire, the Relocation Coordinator will complete the following estimates:

- 1) Miscellaneous Expense: Individual: _____ Family: _____
- 2) Withholding Tax Allowance (WTA): _____
- 3) Relocation Income Tax Allowance (RITA): _____
- 4) Total of allowable reimbursements: _____

PRIVACY ACT

In compliance with the Privacy Act of 1974, the following information is provided, Basis authority for requiring the requested information is contained in 5 USC 5701-5733, particularly sections 5721-5733, 30 USC 905 and Executive Order 9397. Disclosure of the data by you is voluntary. The principal purpose for collecting data is to determine the amount to reimburse an employee for expenses incurred in connection with permanent change of station. Information may be transferred to appropriate Federal, State, local or foreign agencies when relevant to civil, criminal or regulatory investigations or prosecutions. There is no personal liability to you if you do not furnish the requested information; however, we shall not be able to reimburse you for your expenses.